

“Help, we started a journal!”

Adventures in supporting open access publishing using Open Journal Systems



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Hi, I'm Anna Craft, I'm the Metadata Cataloger at UNCG, and today I'm going to talk about how we at UNCG support users of Open Journal Systems (or OJS) on our campus.

The University of North Carolina at Greensboro

- Public, four-year research university
- One of seventeen campuses in the UNC System
- FTE is 18,500
- University Libraries:
 - 2.8 million items (books, govdocs, and microforms)
 - Approximately 90 FTE
 - 30 tenured or tenure-track faculty



First, here's some brief context about our institution and our libraries. We're part of the UNC System, and our FTE is approximately 18,500.

Image by the author.

UNCG University Libraries Support for Open Access

- Scholarly Communications LibGuide
 - <http://uncg.libguides.com/scholarlycomm>
 - Includes info on topics including author rights and the Libraries' Open Access Publishing Fund
- Open Educational Resources LibGuide
 - <http://uncg.libguides.com/oer>
- NC DOCKS (Institutional Repository)
 - <http://libres.uncg.edu/ir/uncg/>
- Copyright education and information
 - <http://copyright.uncg.edu/>
- Data management
 - <http://uncg.libguides.com/RDM>



OJS isn't the only open access endeavor we're involved in. This slide includes some of our related efforts, including our active institutional repository, NC DOCKS. But OJS is what I'm going to focus on today.

Open Journal Systems (OJS)

- Free, open-source software that was developed by the Public Knowledge Project (PKP).
- Specifically designed to assist faculty and researchers in publishing peer-reviewed open access journals.
- More information:
 - <https://pkp.sfu.ca/ojs/>

OJS was developed by the Public Knowledge Project (PKP), specifically to aid faculty and researchers in publishing open access journals. This is a program that you download and run on your own web server (though PKP also offers hosted options).

OJS at UNCG

- Software selected and installed in 2010.
- The University Libraries have strong commitments to service, innovation, and open access initiatives.
- UNCG faculty members requested support in this area.
- Currently ten active journals, with others in development.
- <http://libjournal.uncg.edu/>

UNCG started using OJS in 2010, in response to faculty requests for support in this area.

Active Journals

- Archival Practice
- Global Journal of Peace Research and Praxis
- The International Journal of Critical Pedagogy
- Journal of Appreciative Education
- Journal of Backcountry Studies
- Journal of Learning Spaces
- The North Carolina Journal of Mathematics and Statistics
- Partnerships: A Journal of Service-Learning and Civic Engagement
- Proceedings of the Conference for Entrepreneurial Librarians
- Working Papers on Language and Diversity in Education

<http://libjournal.uncg.edu/>

We currently host ten active journals, and have several others that are in development. As you can see, there is a wide range of topics represented here--from the archival profession to math and statistics to service learning.

UNCG Hosted Online Journals

Archival Practice

[VIEW JOURNAL](#) | [CURRENT ISSUE](#) | [REGISTER](#)

Global Journal of Peace Research and Praxis

[VIEW JOURNAL](#) | [CURRENT ISSUE](#) | [REGISTER](#)

The International Journal of Critical Pedagogy

[VIEW JOURNAL](#) | [CURRENT ISSUE](#) | [REGISTER](#)

International Journal of Nurse Practitioner Educators

[VIEW JOURNAL](#) | [CURRENT ISSUE](#) | [REGISTER](#)

Journal of Appreciative Education

[VIEW JOURNAL](#) | [CURRENT ISSUE](#) | [REGISTER](#)



Journal of Backcountry Studies

[VIEW JOURNAL](#) | [CURRENT ISSUE](#) | [REGISTER](#)

<http://libjournal.uncg.edu/>

This is a snippet of a screenshot that shows our main landing page with part of the list of hosted journals, along with a link to the full page.



Journal of Backcountry Studies

HOME ABOUT USER HOME SEARCH CURRENT ARCHIVES

Home > Vol 9, No 1

Journal of Backcountry Studies

The *Journal of Backcountry Studies* is a refereed scholarly journal on the Internet focused on the colonial history of the Backcountry - the rural corridor that stretches from southern Pennsylvania to Augusta, Ga.

Vol 9, No 1: Spring 2014

Table of Contents

Articles

Rice Duncan's Long Rifle: A Study of the East Tennessee Long Rifle Tradition	PDF
Jessi White	
Backcountry Bartleby: The Account Books of James L. Smith	PDF
Myra DeLapp Moffett	
Richard Oswald as "An American": How a Frontier South Carolina Plantation Identifies the Anonymous Author of American Husbandry and a Forgotten Founder of the United States	PDF
Robert Scott Davis	
Alexander Cumming - King or Pawn? An Englishman on the Colonial Chessboard of the Eighteenth-century American Southeast	PDF
Ian David Chambers	

OPEN JOURNAL SYSTEMS

[Journal Help](#)

USER
You are logged in as...
arcraft
[My Journals](#)
[My Profile](#)
[Log Out](#)

JOURNAL CONTENT
Search

All

Browse
[By Issue](#)
[By Author](#)
[By Title](#)
[Other Journals](#)

<http://libjournal.uncg.edu/index.php/jbc>

Here is part of a screenshot of the main page for one of our hosted journals--*The Journal of Backcountry Studies*. The OJS system enforces the same basic layout for all journals, but there are also options for personalization, as you see with the banner at the top. This journal has been around since 2006, it was previously published on the web and was moved to OJS after the Libraries started offering this service.

Library Roles

Team of three library personnel:

- **Librarian, Cataloging Department**
 - Provides support and training for journal personnel
 - Averages 5 hours per week on OJS
- **Digital Technology Consultant, Electronic Resources and Information Technology Department (ERIT)**
 - Manages server and maintains OJS software
 - Averages 4 hours per week on OJS
- **Assistant Dean, Library Administration**
 - Provides outreach, publicity, and faculty relations
 - Averages 30 minutes per week on OJS

We have three library personnel who support this service in various ways.

I'm the first person on the list, the metadata librarian in the Cataloging Department. I provide support and training on using the software to personnel at the individual journals. This became part of my job in early 2014, after one of my colleagues retired. I was already providing somewhat similar support for users of our institutional repository system, NC DOCKS, so this assignment made a certain amount of sense. My time commitment in this area can vary wildly. Some weeks I might spend an hour on OJS things, other weeks I might spend ten - there's no way to predict what sorts and how many support requests will come in. What I can say is that the number of support requests is growing (as is the number of journals we support).

Next is our Digital Technology Consultant in our Electronic Resources and Information Technology Department. He manages the server, maintains the OJS software, and does initial technical setup for new journals as they are requested. He spends approximately four hours a week on OJS, but again, that number varies.

Then we have our Assistant Dean. She provides outreach, publicity, and faculty relations, particularly to faculty members who may potentially be interested in creating journals. She does lots of outreach about open access on campus, so she is in a good position to educate people about our offerings, including OJS. On average, she spends about thirty minutes a week on tasks relating to OJS.

What we don't do

Roles

- » Journal Managers
- » Editors
- » Section Editors
- » Layout Editors
- » Copyeditors
- » Proofreaders
- » Reviewers
- » Authors
- » Readers
- » Subscription Managers



This is a screenshot of the available roles you can assign within OJS. Not all of these will necessarily be used (most journals don't require subscriptions, so there are not usually subscription managers). Individual journals are responsible for assigning and carrying out these roles.

Skills needed: For journal personnel

- Technical
- Graphic design
- Web design
- Copyediting and proofreading
- Article layout
- Policy and decision-making

Journal creators may not realize some of the skill sets they may need or want in order to make the journal meet their desired standards of professionalism. Here are some of the ones we've identified.

Technical—working in online systems

Graphic design—creating banners and other graphic elements

Web design—customizing stylesheets and web layout. There are some elements that are controlled at the top, by our digital technology consultant, but there are other things that can be customized journal-by-journal. And it is up to each journal to do those things if they want them done.

Copyediting and proofreading for articles

Layout—setting up articles with the desired look-and-feel. Some journals want the traditional two-column layout for their articles, which means they need to have someone on staff who can meet that need.

Policy issues, which could relate to things like copyright questions and much more.

Questions we get

- Technical
- Graphic design
- Web design
- Copyediting and proofreading
- Article layout
- Policy and decision-making



These are some of the types of questions we get.

Questions we get



- Why can't I log in?
- Where is XYZ article in the review process?
- Who has permission to do XYZ action?
- Can I use the system to send a modified version of article XYZ to reviewers?
- Is there a copyright agreement for authors?
- Can I change the copyright policy for some materials?
- Can I change the look and feel of the site?
- What layout format should we use for articles?
- How do I get an ISSN for my journal?

To be a little more specific, here are some example questions. Some of these are things we can help with - logging in, figuring out where articles are in the review process, et cetera. But with questions like “what layout format should I use?”, while we can provide examples of how others are doing it, the decision is really up to the journal.

Skills needed: For support personnel

- Technical
- Customer service
- Teaching / training
- Collaboration
- Patience
- Research
- A willingness to experiment

And here are the skills needed for people who are in a position similar to mine. I meet with journal personnel in person to provide initial training on the system, but often after that questions come via email or the phone.

And here is where I'll say that OJS is not an easy system to be thrown into. It is very powerful, but it is also very complicated.

Submission

Authors

Jenny Dale

Title

Test HTML

Section

Articles

Editor

Jenny Dale

Copyediting

REVIEW METADATA

REQUEST

UNDERWAY

COMPLETE

ACKNOWLEDGE

1. Initial Copyedit

N/A

COMPLETE

N/A

File: Request email cannot be sent until file is selected for copyediting in Editor Decision, Review page.

2. Author Copyedit

—

—

File:

3. Final Copyedit

N/A

2011-12-06

N/A

File:

Upload file to

Step 1,

Step 2, or

Step 3

Browse

No file selected.

Upload

Copyedit Comments

No Comments

COPYEDIT INSTRUCTIONS

Scheduling

Schedule for publication in

Vol 1, No 1 (2010)

Record

TABLE OF CONTENTS

Published

December

06

2011

Record

Layout

REQUEST

UNDERWAY

COMPLETE

ACKNOWLEDGE

Layout Version

N/A

N/A

N/A

N/A

File: 220-1660-1-LE.HTML 2012-05-28

Galley Format

FILE

None

ORDER

ACTION

VIEWS

Supplementary Files

FILE

None

ORDER

ACTION

Here is a screenshot of some of the inner workings of OJS relating to submitting and publishing an article. This is just one of many screens associated with an article. I provide training on the system and the process, but journal staff need to be comfortable working in a complex online system that enforces processes—for example, a journal editor can't just upload a pre-approved article and go straight to posting it. Articles must be submitted by people in the *author* role, and must go through multiple steps before they can be posted. The system will let you track and monitor submissions closely and will also send automated emails to relevant personnel if you set up that feature. But if you miss a step, it is easy to get stuck or lost in the process, especially for new users of the system.

Challenges

- Software learning curve
- Turnover
 - Libraries' personnel
 - Journal personnel
- Communication
 - Challenges related to disparate locations of journal personnel
- Technical issues
 - Individual customizations are limited
 - The system doesn't provide optimal functionality for all areas (ex: display of special characters in mathematics/statistics)

This software learning curve is one of the challenges we've faced. I can't say that it is the most intuitive system, and it takes some time to learn your way around it. We've had some faculty members who have had some frustrations with it.

We've also faced turnover issues, both in the Libraries and on the staffs of the individual journals.

One thing that can make communication very tricky is if you have a journal manager who starts out at your institution and then goes somewhere else, or if many or all of the journal staff are based at other institutions. Sometimes questions come up that could be answered in fifteen minutes via a face-to-face meeting, but can take hours or days through email or phone conversations.

We've also had some requests from journal managers that we haven't been able to fill. Sometimes we can't fill a request because a change for one journal would affect all of them-- individual customizations are limited in a shared, hosted system.

Sometimes we can't fill a request because the functionality doesn't exist in the system, such as support for display of some special characters used in mathematics and statistics.

Lessons learned

- Free software is not without its costs
- Sustainability planning is important
 - Journal management
 - Host institution
- On-campus contact for each journal
- Journal managers must be prepared to do some technical work, or to hire others to do it for them



Here are some of the things we've learned.

Obviously, even though the system is free, it still has costs related to time and expertise.

Sustainability planning is important, and should particularly be stressed to journal managers.

We are now requiring that each journal have at least one on-campus contact--if the primary journal manager was at UNCG when the journal started, if they leave, they must designate another person at UNCG to be the on-campus contact.

We are also trying to be proactive in educating journal managers about the tasks they may not realize will be part of their work.

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Value

- Strengthen relationships between the Libraries, faculty, and scholarly communities
- Meet needs of campus faculty
- Support new publishing models
- Facilitate content creation
- Demonstrate commitment to open access



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Looking forward



- Examine impact and readership
- Create in-house policies for sustainability and training
- Publicize offerings to campus faculty

Thank you!

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Image by the author.